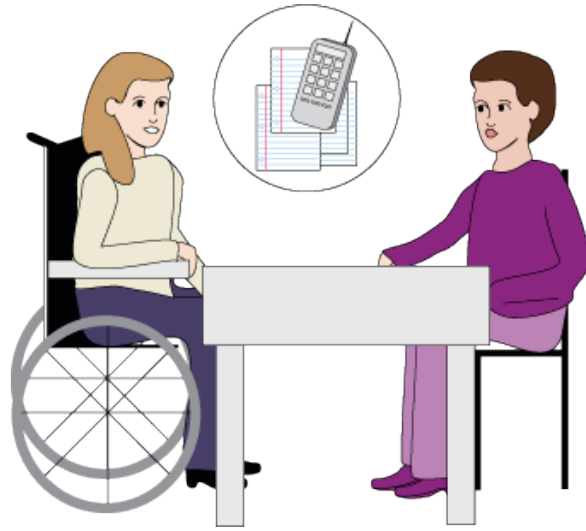


# FACILITATION



## PURPOSE – PLANNING – PRACTICE

### Facilitation Plan

All members of boards, committees and councils must be able to participate equally and make informed decisions. It is important that members who need assistance on a board, committee or council be encouraged and made aware that accommodations are available to enhance their participation.

The following worksheets are designed as a self-survey that addresses a range of facilitation support needs to help identify the type and amount of support that may be useful. The worksheets are designed to be completed by the member and facilitator. Discussion by the facilitation partners is an important component of the self-survey. It provides an opportunity to learn how the team will work together and best ways to provide support.

# Facilitation Worksheet

Facilitator and Member to complete.

## Organization:

1. Does the organization have a job description for facilitators? (If so, review)

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2. Can the organization or meeting leader add the facilitator to important mailing lists?

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3. What adaptations does the member currently use at work or home?

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4. Would these adaptations be useful at meetings? (Which ones)

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5. How will personal care needs be met, if required?

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6. Is there specific support the member wants? (List)

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# Facilitation Worksheet

Facilitator and Member to complete.

## Personal Needs:

1. Mobility (walking, help with stairs and elevators, transferring in/out of wheelchair, opening doors, etc.)

Support I want:

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2. Meeting Site (location, contact information, meeting room, bathroom)

Support I want:

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3. Transportation (making arrangements)

Support I want:

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4. Hotel Accommodations (accessible room, locating people, meeting room, etc.)

Support I want:

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5. Food and Drink (assistance with meals, eating or drinking )

Support I want:

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# Facilitation Worksheet

Facilitator and Member to complete.

## Personal Needs:

6. Medication (reminders to take, and medication effects)

Support I want:

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7. Personal Appearance

☐

Grooming

☐

Professional Image

☐

Hygiene

Support I want:

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8. Bathroom Assistance (opening doors, transferring, etc.)

Support I want:

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9. Transportation (arranging: public, private, special)

Making arrangements \_\_\_\_\_

Paying for transportation \_\_\_\_\_

Waiting until ride arrives \_\_\_\_\_

Support I want:

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10. Other:

Support I want:

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# Facilitation Worksheet

Facilitator and Member to complete.

## Member Duty Needs:

### 1. Understanding organization's structure and process

- ☐ How meeting is run, Robert's Rules
- ☐ Review by-laws or operating rules
- ☐ How members communicate with each other and make decisions
- ☐ How the meeting makes decisions

Support I want:

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### 2. Reviewing materials for the meeting

- ☐ Minutes
- ☐ Agendas
- ☐ Action items
- ☐ Other materials in packet

Support I want:

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### 3. Speaking up

- ☐ Talking about ideas before meetings
- ☐ Highlighting main points to talk about
- ☐ Preparing statements, reports

Support I want:

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# Facilitation Worksheet

Facilitator and Member to complete.

## Member Duty Needs:

### 4. Asking questions and making comments

- ☐ Writing down questions or comments to bring to meetings
- ☐ Making sure my points get across to the group
- ☐ Remembering at the meeting:
  - ☐ ask my question
  - ☐ make my statement

Support I want:

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### 5. General Reminders

- ☐ Completing calendars, meeting dates and times
- ☐ Making phone calls and writing emails
- ☐ Getting information
- ☐ Completing assigned work
- ☐ Bringing materials to meetings

Support I want:

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# Facilitation Worksheet

Facilitator and Member to complete.

## Member Duty Needs:

### 6. Making materials understandable

Adaptations:

- |   |   |
|---|---|
| <input type="checkbox"/> large print                              | <input type="checkbox"/> pictures and text    |
| <input type="checkbox"/> pictures only                            | <input type="checkbox"/> computer disk        |
| <input type="checkbox"/> Braille                                  | <input type="checkbox"/> language translation |
| <input type="checkbox"/> plain language: easy-to-understand words |   |

Support I want:

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### 7. Reading materials

- ☐ Turning pages, highlighting main points
- ☐ Writing summaries
- ☐ Reading materials aloud
- ☐ Explaining hard-to-understand language
- ☐ Explaining acronyms or new terms

Support I want:

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### 8. Taking notes

- ☐ Writing down important points, actions, decisions
- ☐ Take notes on paper or a computer
- ☐ Explaining notes

Support I want:

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# Facilitation Worksheet

Facilitator and Member to complete.

## Professional Needs:

**Do you want help with:**

**YES**

**NO**

### UNDERSTANDING HOW THE GROUP WORKS

Ground rules

☐☐

Voting procedures

☐☐

Meeting structure

☐☐

Remembering people and their jobs

☐☐

Staying on topic

☐☐

### DECIDING WHAT IS MOST IMPORTANT TO DO

Which project to do first

☐☐

Which projects or committees to join

☐☐

### REVIEWING OR READING MEETING MATERIALS

Minutes

☐☐

Agendas

☐☐

Action items

☐☐

Additional information

☐☐



# Facilitation Worksheet

Facilitator and Member to complete.

## Professional Needs:

**Do you want help with:**

**YES**

**NO**

### REMEMBERING THINGS

Meeting times

☐☐

Scheduling the calendar

☐☐

Making phone calls

☐☐

Writing letters

☐☐

Finding information

☐☐

Completing assigned work

☐☐

Bringing materials to meetings

☐☐

### COMMUNICATION

Using the phone

☐☐

Leaving messages

☐☐

Helping others understand me

☐☐

Sending or receiving emails

☐☐

Printing emails

☐☐

# Facilitation Worksheet

Facilitator and Member to complete.

## Professional Needs:

**Do you want help with:**

**YES**

**NO**

### DOCUMENTS

Signing documents

☐☐

Signing my name with permission

☐☐

Explaining what needs to be signed  
(and what the document means)

☐☐

### READING MATERIALS

Reading materials aloud

☐☐

Reading together during prep time

☐☐

Putting important written ideas into pictures

☐☐

### UNDERSTANDING NUMBERS

Showing numbers as pictures (chart/graph)

☐☐

Writing numbers as words

☐☐

Removing zeros, rounding off

☐☐

Understanding meaning of the numbers

☐☐

### REMEMBERING IMPORTANT INFORMATION

About members of board, committee, council

☐☐

Things I have read

☐☐

Important discussions

☐☐

Questions to ask

☐☐

Comments to make

☐☐

Other:

# Facilitation Worksheet

Facilitator and Member to complete.

## Partnership:

### **The best way for us to:**

Communicate between meetings

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Work together at meetings

How do we sit at meetings? (at the person's side, in the audience, etc.)

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What kind of cues to use during the meeting? (physical, pointing, verbal, writing)

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How will the member present positions/statements at meetings? (speak independently, with assistance, read member statements)

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Make adaptations

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# Facilitation Worksheet

Facilitator and Member to complete.

## Summary Page:

Personal Needs:

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Member Duty Needs:

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Professional Needs:

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# Facilitation Worksheet

Facilitator and Member to complete.

## Agreement

As partners we will communicate openly and honestly with each other.

### As the member, I agree to:

- a. Work as a partner with my facilitator.
- b. Communicate when I have questions or concerns about facilitation.
- c. Be prepared and professional.
- d. Communicate when I need to change my plan.
- e. Respect confidentiality of the facilitator.
- f. Other

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### As the facilitator, I agree to:

- a. Work as a partner with the member.
- b. Communicate when I have questions or concerns about facilitation.
- c. Be prepared and professional.
- d. Respect confidentiality of the member.
- e. Other

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signature (member)

date

---

signature (facilitator)

date

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signature (organization)

date

**Make copies for facilitator and organization**